February 27, 2015

RE: System Integrator, Data Management & Dissemination, and Interactive Voice Response (IVR) Request for Information (RFI) for San Francisco Bay Area's 511 Service

Dear Provider:

The Metropolitan Transportation Commission (MTC) is seeking responses to a Request for Information (RFI) to provide system integrator, data management & dissemination, and interactive voice response (IVR) services for the San Francisco Bay Area's 511 Service. Feedback and comments on any aspect of this RFI are welcomed from all interested individuals, public, private, and academic entities. All responses will be evaluated against MTC's future 511 program plans, after which MTC intends to issue one or more formal Requests for Proposal (RFP) for the procurement of a contract or contracts for any or all of these and other services. You may download a copy of the RFI from MTC's website at: http://procurements.mtc.ca.gov.

Your decision to participate or not to participate in this RFI process will not impact (positively or negatively) MTC's consideration of any proposal you may submit in response to any resulting RFP.

MTC may contact responders to discuss the responses, questions, and comments provided in response to this RFI.

RFI Response Due Date
To ensure that your comments are considered, they must be received no later than Thursday, March 19, 2015 at 4:00 pm PDT. All responses relating to this RFI should be submitted electronically to the address below using the required answer template.

Sarah Husain, 511 Transit Program Coordinator
shusain@mtc.ca.gov
Metropolitan Transportation Commission
Joseph P. Bort MetroCenter
101 - 8th Street
Oakland, CA 94607-4700

Sincerely,

Melanie Crotty
Director, Operations

<u>**REQUEST FOR INFORMATION**</u>

<u>**System Integrator, Data Management & Dissemination, and Interactive Voice Response for 511 San Francisco Bay Area**</u>

I.   Introduction

MTC is the transportation planning, coordinating, and financing agency for the nine-county San Francisco Bay Area. MTC manages a range of technology projects intended to improve transportation system management, including managing and operating the regional 511 Traveler Information Program.

The San Francisco Bay Area includes the nine counties bordering the San Francisco Bay: Alameda and Contra Costa Counties in the East Bay; Marin, Napa, Solano, and Sonoma Counties in the North Bay; San Francisco and San Mateo Counties on the Peninsula; and Santa Clara County in the South Bay. The region has nearly 20,000 miles of local streets and roads, over 1,400 miles of highway, and over two dozen transit agencies. More than 7 million people live within its 7,000 square miles.

II.   The San Francisco Bay Area's 511 Program

511 is a free phone and web service that consolidates Bay Area transportation information into a one-stop resource. 511 provides up-to-the-minute information on traffic conditions, incidents and driving times, transit trip planning and schedules, routes, and fare information for the Bay Area's public transportation services, a bicycling map and route planner, parking information, and a ridematch program. The program provides transportation information to the public by telephone via the federally dedicated 511 number, on the web at 511.org, on mobile at m.511.org, via text messaging, and through transit trip planner applications for iOS and Android.

After twelve years in operation, 511 is currently planning its Next Generation (NextGen) system. The drivers for NextGen planning include an ongoing need for traveler information in the Bay Area, a general rise in customer expectations around this information, rapid changes in technology and development in the commercial sector, increased private sector alternatives, and long-term funding forecasts.

III.   Purpose of RFI

Integral parts of the planned overall NextGen 511 system include system integration, data management and dissemination, and an interactive voice response (IVR) system. It should be noted that MTC already has a web services contractor that will be creating the NextGen 511 website and other public facing dissemination elements.

The purpose of this RFI is to gather industry input on the system integration, data management and dissemination, and IVR roles with the following objectives in mind:

1. Determine the level of interest from potential bidders in responding to a formal RFP solicitation(s);
2. Evaluate the various technologies and services that are available to provide these services; and
3. Apply industry input in response to the RFI to inform any future RFP.

With input from this RFI, MTC intends to release one or more RFPs to meet these future needs.

IV.   Requested Information

Responses to this RFI should include the following:

a. Cover Letter (max 1 page)
Cover Letters should include a brief description of your company, key principals and their credentials, and all contact information including name, address, phone number, and email address.

b. Qualifications (max 3 pages)
Provide a brief summary of your qualifications for responding to this RFI as well as any services or technologies related to the goals of the RFI. Your response should include a concise but thorough description of existing services/products and technologies, as well as any development and product roadmap information that you are willing to disclose at this time.

c.   RFI Questions
Please address the questions provided in Attachment A, <u>Answer Template</u>. There are several sections with questions about the following categories:
A. Respondent + Existing Client Information
B. Automated Traffic Data Collection, Aggregation, and Transformation
C. Transit Data Collection, Aggregation, and Transformation
D. Manual/Other Data Collection and Staffed Traveler Information Center Capabilities
E. Interactive Voice Response (IVR) System
F. Trip Planning/Routing Engine, Mapping, and Other Dissemination
G. System Platform(s)

V.   Questions and Answers

Respondents will be provided the opportunity to ask questions about this RFI. Respondents should email all questions to Sarah Husain, 511 Transit Program Coordinator, at shusain@mtc.ca.gov. All questions should be submitted by 4:00 p.m. Thursday, March 5, 2015. Questions will be posted anonymously and answers will be provided on the MTC contract

opportunities website (http://procurements.mtc.ca.gov), and the Google Drive document at http://goo.gl/7uI17m. MTC may respond to questions on a rolling basis, but all answers will be provided no later than Thursday, March 12, 2015.

VI. Tentative Schedule

The tentative schedule of the RFI process is as follows:

- By 4:00 p.m. Thursday, March 5, 2015: deadline for submitting questions
- By 4:00 p.m. Thursday, March 12, 2015: all answers will be posted to the MTC contract opportunities website (http://procurements.mtc.ca.gov), and to the Google Drive document at http://goo.gl/7uI17m
- Thursday, March 19, 2015 at 4:00 pm PDT: deadline for RFI response submission

All responses relating to this RFI should be submitted electronically to the address below no later than 4:00 pm PDT on Thursday, March 19, 2015.

Sarah Husain, 511 Transit Program Coordinator
shusain@mtc.ca.gov

The tentative schedule for the resultant RFP(s) will be advertised separately.

Respondents to this RFI are encouraged to visit http://procurements.mtc.ca.gov/ to register its organization in the MTC vendor/consultant database. When the RFP resultant of this RFI or any procurement for an area of service your entity provides is issued, you will be notified via email. On that website you will also find a list of current, upcoming, and awarded contracts.

The RFI and RFP tentative schedules may change without prior notification to the vendors.

VII. General Conditions

a. This RFI does not commit MTC to award a contract or to pay any costs incurred in the preparation of a response to this RFI.

b. Public Records

This RFI and any material submitted in response to this RFI are subject to public inspection under the California Public Records Act (Government Code § 6250 *et seq*.), unless exempt by law. Other than proprietary information or other information exempt from disclosure by law, information submitted to MTC will be made available for inspection consistent with the California Public Records Act.

If a Respondent believes any content submitted contains trade secrets or other proprietary information that the respondent believes would cause substantial injury to the respondent's

competitive position if disclosed, the respondent may request that MTC withhold from disclosure such proprietary materials by marking each page containing proprietary information, as confidential and shall include the following notice at the front of its response:

> "The data on the following pages of this response, including financial information submitted under Section ___ of this RFI marked along the right margin with a vertical line, contain technical or financial information which are trade secrets and/or which, if disclosed, would cause substantial injury to the respondent's competitive position. The Respondent requests that such data be used for review by MTC only, but understands that exemption from disclosure will be limited by MTC's obligations under the California Public Records Act. [List pages]."

Failure to include this notice with relevant page numbers shall render any "confidential/proprietary" markings inadequate. Individual pages shall accordingly not be treated confidentially. **Any language purporting to render the entire response confidential or proprietary will be regarded as ineffective and will be disregarded.**

In the event properly marked data is requested pursuant to the California Public Records Act, the Respondent will be advised of the request. If the response requests that MTC withhold such data from disclosure and MTC complies with the Respondent's request, the Respondent shall assume all responsibility for any challenges resulting from the non-disclosure; indemnify and defend MTC and hold it harmless from and against all claims, legal proceedings, and resulting damages and costs (including but not limited to attorneys' fees that may be awarded to the party requesting such information); and pay any and all costs and expenses relating to the withholding of the Respondent information.

If the Respondent does not mark each page containing proprietary information as confidential, does not include the statement described above at the front of its response, and/or does not request that MTC withhold information marked as confidential and requested under the California Public Records Act, MTC shall have no obligation to withhold the information from disclosure, and the respondent shall not have a right to make a claim or maintain any legal action against MTC or its commissioners, officers, employees or agents in connection with such disclosure.

Attachment A
Answer Template

Respondents should answer questions using the following answer template. Screenshots and photos can be included in responses. Respondents may also provide demo account access or URLs, as available. **Respondents are not required to answer all questions or sections; but are encouraged to respond to all sections and questions that apply.** If you choose not to respond to a question or section, please notate with "n/a." Do not delete sections you choose not to answer. Unless otherwise noted, all responses should reflect **current** system offerings that are currently deployed and actively operated.

If your responses are more suitable in a landscape format, please feel free to update the page layout to meet your needs.

Table of Contents (please update before submission of answers)

A. Respondent + Existing Client Information

	Question	Response
1.	Name of individual or entity:	
2.	Please provide a list of <u>current</u> 511 and/or traveler information deployments, including the following: - URL of deployment - geographical region - the extent of travel modes - the types of roadways covered - the year the system was first installed and last updated - the agency you are contracted with - client reference information (name, position, phone, email)	
3.	Are your services for new systems offered as Software as a Service (SaaS), customized Commercial Off-The-Shelf (COTS), open source, or custom development? Please describe.	
4.	What is your average time post-contract award to launch? Provide examples for a new system launch as well as and integration of a preexisting system, as applicable.	

Name of Individual or Entity:

B. Automated Traffic Data Collection, Aggregation, and Transformation

	Question	Response
1.	What data product(s) have you developed to automatically import traffic data?	
2.	Do you have pre-established relationships/built-in integration with certain data providers? Please describe.	
3.	What is the source and format of the following data your system uses? <u>List all sources</u> for each category.	
	i. Speed data	
	i. Driving times data	
	i. Incident data	
	v. Roadway construction data	
	v. Local/special event data	
	i. Parking data	
	i. Express lane data (e.g. variable toll info, travel times, etc.)	
	i. Other traffic data	
4.	Describe your data fusion process and how priority is assigned to certain sources.	
5.	Do you provide managed lanes vs. general purpose lane traffic data and travel times?	
6.	California-specific interoperability:	
	a. Do you have a data interface for the California Highway Patrol (CHP) incident data feed? Is the import of incident data completely automated, or does it require complete/limited operator intervention?	
	b. Do you have a data interface for the Caltrans Lane Closure System (LCS) construction data feed? Is the import of construction data completely automated, or does it require complete/limited operator intervention?	
	c. Do you have a data interface for the Caltrans cameras and changeable message signs data feeds? Is the import of data completely automated, or does it require complete/limited operator intervention?	

Name of Individual or Entity:

7.	Does your system have preexisting integration with any 3rd party camera providers, e.g., Trafficland? Please describe.	
8.	Does your system have any other features not previously discussed? Please describe.	

Name of Individual or Entity:

C. Transit Data Collection, Aggregation, and Transformation

	Question	Response
1.	Is your transit data collection automated or manual? Please describe.	
2.	What is the source and format (GTFS, etc.) of the following data your system consumes & uses?	
	a. Static transit data: agency information, schedules, stops, routes, fares, trips, etc.	
	b. Real-time transit departures	
	c. Real-time vehicle locations	
	d. Real-time transit service alerts	
	e. Planned event transit service alerts	
3.	Do you have a data management portal and database for transit operators to manually or automatically enter/edit data and schedules? Please describe.	
	a. Does it generate GTFS and/or GTFS-Realtime feeds for dissemination?	
	b. Does it pull in other data such as service alerts, etc.?	
4.	What QA/QC processes and tools do you use for real-time transit and static transit data?	
5.	From how many agencies, in a single system, do you collect/manage transit data?	
6.	Does your system have any other features not previously discussed? Please describe.	

Name of Individual or Entity:

D. Manual/Other Data Collection and Staffed Traveler Information Center Capabilities

	Question	Response
1.	Besides traffic and transit data previously mentioned, do you collect any other sources of static or real-time data, e.g., parking, rideshare, etc.? How many different sources does your system aggregate? Please describe.	
2.	Do you provide a mechanism for crowd-sourced data and incident reporting? How do you integrate this into your data?	
3.	Describe your manual data entry management system.	
	a. Is it a web-based interface?	
	b. Please describe the capability for designated user(s) to add/update the system for alerts, events, emergencies, and breaking news items:	
	i. Traffic incident data	
	ii. Roadway construction data	
	iii. Local/special event data	
	iv. Emergency information	
	v. Transit data (static, real-time, transit operator info)	
	vi. IVR floodgates	
	vii. Social media	
	viii. Breaking news web tickers	
	ix. Web announcements (traffic and transit information)	
4.	Do you operate a staffed traveler information center? Please describe.	
5.	What criteria/processes do your operators use to verify and confirm automated data?	
6.	Do you have a tool for manually overriding speed data and/or inserting road closures?	
7.	Do you have any other Content Management Systems that have not yet been described, e.g., bug tracking, issue tracking? Please describe.	
8.	Does your system have any other features not previously discussed? Please describe.	

Name of Individual or Entity:

E. Interactive Voice Response (IVR) System

In the "Yes?" column, please mark with an X if your system provides this information or functionality. Please provide details on all features your system has.

	Information / Functionality	Yes?	Comments
1.	IVR Features		
	a. Traffic slowdowns and congestion		
	b. Traffic incidents		
	c. Traffic travel times from user-selected point-to-point		
	d. Traffic travel times on popular corridors (not user defined)		
	e. Managed lanes information: please describe.		
	f. Real-time/static parking information: please describe.		
	g. Real-time transit departure/arrival times from user-provided stop ID# and/or location		
	h. Floodgates: please describe.		
	i. Transfers to customer service centers		
	j. Transfers from customer service centers		
	k. Personalization: Please specify if personalization is via registration and/or automatic number identification (ANI).		
	l. Special emergency information features: Please describe any emergency information capabilities your system offers.		
	m. Are you currently providing location-based incident information paired with driving times for a user-defined route?		
2.	IVR System Information		
	a. Persistent touchtone		
	b. Text-to-speech: please note specific uses (e.g., floodgates only).		
	c. Concatenated speech		
	d. Multi-language support: please list languages supported and in what way.		
	e. Natural language		

Name of Individual or Entity:

	f. Base call capacity/ burstability/redundancy/ reliability/scalability: Provide an example of the highest number of simultaneous calls that the system was able to handle during a specific event such as snowstorm, flood, etc.		
	g. Cloud hosting		
	h. Voice over IP		
	i. IVR platform: What is your IVR platform, e.g., Nuance, Open VXML, others?		
18.	Please outline your IVR fee structure, e.g., transferred calls, voice recognition, telco costs, hosting costs, shared costs among others in a consortium.		
19.	Who is your telco provider?		
20.	Does your system have any other features not previously discussed? Please describe.		

Name of Individual or Entity:

F. Trip Planning/Routing Engine, Mapping, and Other Dissemination

	Question	Response
1.	Do you provide a trip planning/routing engine?	
2.	Is your trip planning/routing engine provided via Software as a Service (SaaS), customized Commercial Off-the-Shelf (COTS), custom development, or OpenTripPlanner? Please describe.	
3.	What modes are supported in your trip planning/routing engine? a. Traffic b. Transit c. Bicycling d. Parking e. Walking f. Rideshare g. Real-time information	
4.	Does your system support current trip planning, predictive trip planning, or both? Please explain for all modes.	
5.	Does your system provide dynamic rerouting given current travel (traffic and/or transit) conditions? Please describe.	
6.	Have you integrated your system with shared mobility services like Uber, Lyft, or Carma? Please explain.	
7.	Have you made your trip planner/routing engine available for integration in a website or mobile platform that is designed, operated, and maintained by another contractor? If so, how was this accomplished (e.g., frameable page, downloadable widget, API)?	
8.	Have you integrated a 3rd party routing engine (API-driven) into an IVR? Please explain.	
9.	What basemap and/or mapping service do you maintain and/or support?	
	a. Is it a custom map, an open source map, or another third-party map?	
	b. How is traffic speed data associated to the map?	
	c. How are traffic incidents associated to the map?	

Name of Individual or Entity:

	d.	How does the driving times algorithm work with the map? How does this differ from the implementation on the IVR?	
	e.	How do you associate transit data to the map?	
10.		How do you export data for dissemination? What data feeds or APIs do you offer for traveler information dissemination? Please describe the following:	
	a.	Types/content of available data?	
	b.	A standard interface for data exchange, e.g., TMDD, GTFS, GTFS-realtime, SIRI, XML, etc.	
	c.	Consolidated data feed of multiple sources for different types of data	
	d.	Social media capabilities/feeds and integration	
	e.	Interfaces with other dissemination channels	
11.		How do you make these data feeds available, e.g., a developer resources portal, FTP, automated notification of data updates? Please describe.	
12.		Do you provide customizable apps?	
	a.	What operating system(s) are supported?	
	b.	What features do you currently offer in your app? Describe modes and tools/information provided.	
	c.	What travel modes are supported?	
	d.	Please describe possible customization and/or white labeling options.	
	e.	Do you provide audible and/or push alerts?	
	f.	Do you have location-based services/features?	
13.		Does your system have any other features not previously discussed? Please describe.	

Name of Individual or Entity:

G. System Platform(s)

	Question	Response
1.	Is the system provided as a hosted solution?	
	a. If so, what platform is used, e.g., Microsoft Azure, Amazon Web Services, etc.?	
	b. What portion(s) of your system are hosted here?	
2.	What types of databases does your system use?	
3.	What server operating system(s) does your system use (Linux, Windows, etc.)?	
4.	What development languages does your system use?	
5.	What browsers and versions are supported by your system?	
6.	Do you use any open-source technology in your deployments, or do you have experience with open-source technology through other projects? Please describe.	
7.	Does your system have any other features not previously discussed? Please describe.	

Name of Individual or Entity: